



15 years

of action for
sustainable mobility
2010 | 2025

15 years of action for sustainable mobility

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15 years of regulation at the heart of mobility

Created in 2009, in 2025 the Authority is celebrating fifteen years of commitment to the service of mobility. Having become a leading institution in a decade and a half, it has seen its competencies gradually expand in line with the transformations of the sector.

Initially established as the **Autorité de régulation des activités ferroviaires (Railway Regulatory Authority - ARAF)**, it initially focused on preparing the rail sector for opening up to competition. Its work has made it possible to build a solid economic, technical and legal framework, promoting the arrival of new stakeholders in the domestic market. This dynamic is now very real: 51 freely organised rail services have been notified to the regulator, and alternative operators have entered the market, with tangible effects in terms of supply, traffic, price and quality of service.

In 2015, new powers were entrusted to ARAF to regulate long-distance coaches, access to coach stations and motorway concessions: it thus became the **Autorité de régulation des activités ferroviaires et routières (Railway and Road Regulatory Authority - ARAFER)**.

Since then, 2,279 new intentions to operate a coach transport service have been notified to the regulator. This new transport offering has enabled and continues to enable travellers to travel throughout France at low prices and with a reduced environmental impact. With regard to the motorway concession sector, the regulator's work has enabled users to save more than 700 million euros on tolls and fuel distribution at service areas.

In 2019, ARAFER saw its missions extended to the airport sector, urban transport in Île-de-France and mobility digital data and services, becoming the **Autorité de régulation des transports (Transport Regulatory Authority - ART)**. Since taking over, the regulator has made it possible to limit the increase in costs of accessing airport infrastructure by 76 million euros and has contributed to the emergence

of a renewed multi-year regulatory framework, which is expected to be deployed in the years to come. Its action with the RATP (Paris public transport operator) has enabled the group to engage in a process of controlling and optimising the costs of regulated monopolistic activities. Thanks to the control campaigns it has carried out and the dispute settlement decisions it has made, ART has contributed to improving the quality of passenger information by allowing wider publication of better quality data, and has supported the development of multimodal digital ticketing services.

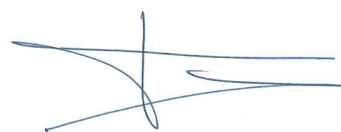
These fifteen years have been marked by emblematic achievements in the various sectors regulated by the Authority, at the service of public interest: recommendations made on the draft performance contracts between the State and SNCF Réseau (French railway infrastructure manager), and work aimed at clarifying the target vision of the rail network over the next 20 years, a study on the opening up of rail passenger transport to competition, reports on the general economy of concessions, drawing up comprehensive feedback on the concession model and outlining analyses and recommendations on the future of motorway concessions, a report on reception solutions for long-distance coaches in Île-de-France coach stations, a report making recommendations on the development of the airport regulatory framework, the publication of guidelines relating to the assessment of the weighted average cost of capital levels of the regulated scope of airports falling within ART's area of competency, the first dispute settlement decisions in the multimodal digital services sector and reports on the transport market in France.

These advances have been made possible thanks to the legitimacy that the Authority has been able to build, driven by the commitment of its successive presidents: Pierre Cardo, from 2010 to 2016, Bernard Roman from 2016 to 2022, and Philippe Richert, who acted as interim until my appointment at the end of December 2023. All of them have enabled the voice of the regulator to be heard loud and clear. The unwavering involvement of the members of the board and the agents over the past fifteen years has enabled the regulator to carry out its missions.

In a context where the challenge of more accessible, quality and sustainable mobility is at the heart of concerns, regulation remains a powerful lever for transformation. This is why I wanted to initiate an 'Act II' of the regulation, based on a strategic project that will guide ART's actions until 2029.

As we celebrate this fifteenth anniversary, I invite you to discover in this document the highlights of ART's activity, its emblematic records as well as the major challenges identified for the years to come. And above all, I would like to pay tribute to all the employees and members of the board, whose work and commitment are ART's core strength.

Thierry Guimbaud
President of the Autorité
de régulation des transports



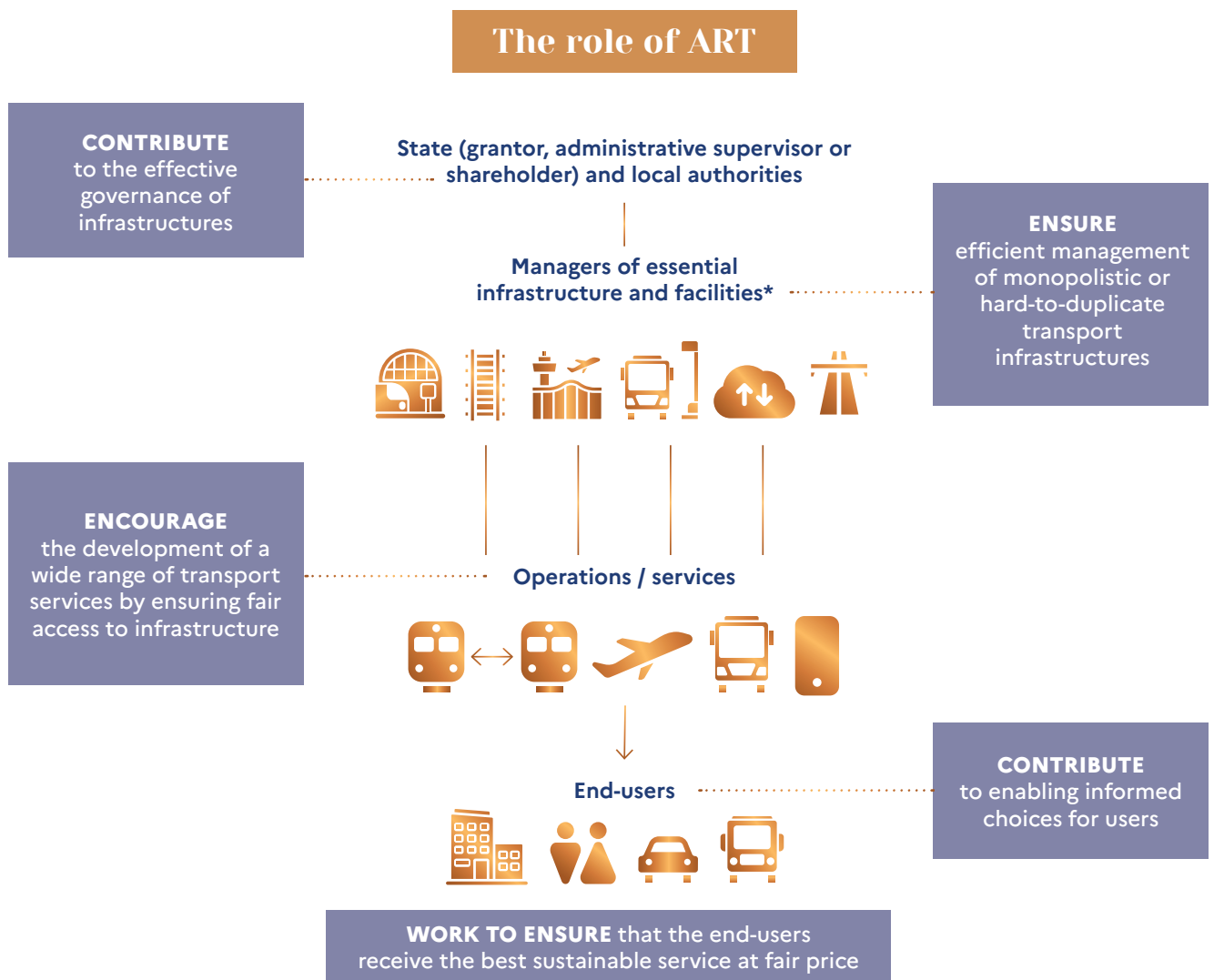
1.

From ARAF to ART: 15 years of economic regulation at the service of mobility

The raison d'être of the economic transport regulator and its powers

For 15 years, ART¹ has been working to develop quality mobility, at the best price, to best serve the travel needs of citizens and businesses. Through its powers, it has created the framework for equitable access to transport infrastructure and their efficient management, in order to contribute to the development of the services that use them.

The monopolistic or quasi-monopolistic nature of the essential infrastructures and activities on which mobility is based (rail network, motorways, airports, or even mobility data) requires them to be subject to regulation. Where the State is also an economic stakeholder, for example by being a shareholder of competing operators, this regulation must also be independent.



¹ For the sake of clarity and simplicity, 'ART' is used throughout this document to refer to the Autorité de régulation des transports [Transport Regulatory Authority], although it has had different names since its creation in 2009 (ARAF, ARAFER).

*Essential infrastructure and facilities, such as the rail network, railway stations or airport facilities, are non-substitutable goods, services or resources that are strictly necessary to carry out a given economic activity.

In order to exercise its missions as an economic regulator, ART has four types of competencies

TO OVERSEE

by specifying, where necessary, the legal framework or its interpretation through:

- ✦ a regulatory power delegated by the legislature in certain matters
 - ✦ In 2014, the regulator used its supplementary regulatory power for the first time to clarify the rules of the game for the allocation of train paths, and to introduce new obligations for SNCF Réseau, in particular in terms of organisation and stability of the works.
- ✦ guidelines
 - ✦ Guidelines on the notification of new freely organised rail passenger transport services and the implementation of the economic equilibrium test (2019).
 - ✦ Guidelines on the capital remuneration of airport infrastructure managers (2023).



TO ARBITRATE

disputes between stakeholders in the sector for everything related to the conditions of access to essential installations, facilities and resources, and more broadly to the opening up of certain sectors to competition.

- ✦ The resolution, in 2020 and 2021, of dispute settlements by ART allowed two regions, Provence-Alpes-Côte-d'Azur and Hauts-de-France, to have the data (previously not communicated by SNCF Voyageurs) necessary to conduct calls for tenders and organise their regional rail transport services.
- ✦ The resolution, in 2024, of dispute settlements by ART has made it possible to improve the transparency of the access conditions for multimodal digital service providers to the digital sales services of mobility service managers.

TO INFORM

public authorities, citizens and stakeholders in a factual and objective manner for improved functioning of the sector, through advisory opinions, reports and studies.

- ✦ Studies on the opening up of rail passenger transport services to competition - (2018, 2022)
- ✦ Report on the long-term scenarios of the rail network (2022–2042) - (2023)
- ✦ Reports on the general economy of motorway concessions - (2020, 2023 and 2024)
- ✦ Economic and financial monitoring reports for airports - (2023 and 2024)
- ✦ Reports on the transport market in France - (2021, 2022, 2024 and 2025)



TO CONTROL

the rates of access charges applied by infrastructure managers, as well as their compliance with their obligations, in particular towards transport operators, through legally binding or advisory opinions and decisions, and possible sanctions in the event of breaches.

- ✦ Between 2016 and 2022, €300 million in tolls were saved by motorway users following the regulator's intervention.
- ✦ In 2023, ART used its sanction powers for the first time in its history, sanctioning SNCF Réseau for failing to comply with its transparency obligations vis-à-vis freight operators.



Increasing ART's scope of action



2009 – 2015

RÉPUBLIQUE FRANÇAISE



2015 – 2019



since 2019

Created in 2009 to support the opening up of the national rail sector to competition, between 2015 and 2019, ART saw its scope of competencies gradually expanded by law to six sectors. This increase in power reflects both the evolution of European and national legislative frameworks, and the need to ensure a level playing field in constantly changing markets.

The legislator regularly supplements the powers of ART in each sector in order to allow it to intervene effectively in exercising its missions.

Date on which ART effectively assumes responsibility



2010

Railway sector

ART contributes to the monitoring and proper functioning of the national rail transport system, in its technical, economic and financial dimensions, notably by overseeing charges and ensuring the quality and fairness of access conditions to the network, stations and other essential rail facilities.

Road passenger transport by long-distance coaches

ART contributes, to the smooth operation of the market for regular intercity passenger road transport services, [...] , in particular by

- ✦ conducting studies and providing relevant information
- ✦ overseeing access rules for facilities and coach stations
- ✦ granting its assent to projects led by transport authorities to prohibit or limit new freely organised coach services operating over distances of 100 km or less.

2015





2016

Motorway sector

- ✦ ART ensures the proper functioning of the motorway toll system
- ✦ may [...] collect data, carry out expert assessments and studies and perform all necessary information activities
- ✦ ensures effective and fair competition in the award of contracts [for works, supplies or services awarded by a concession company for the purposes of the concession].

Airport sector

- ✦ ART approves the rates of charges for services rendered [...] and their adjustments
- ✦ ensures economic and financial monitoring of aerodromes, in particular those whose annual traffic exceeded five million passengers in any of the previous five calendar years.

2019



2020

Digital mobility services sector

- ✦ ART ensures that the data necessary for passenger information is made available and that it is properly reused
- ✦ ensures compliance with the terms and conditions of access to [digital] sales services and the obligations applicable [to the digital distribution of tickets at mainly local and regional level].

Urban public transport in the Île-de-France region

- ✦ ART is responsible for the metro network and the regional express network [...], for the Grand Paris public transport network: in particular, it issues opinions
- ✦ on the remuneration of the infrastructure manager (metro, RER) and technical manager (Grand Paris) paid by Île-de-France Mobilités
- ✦ on the pricing of security services applicable to operators.



2020

Strengthened governance as competencies evolve

The gradual expansion of ART's area of competency has been accompanied by a change in the organisation and composition of its board, its decision-making and strategic body.

The board constitutes ART's decision-making body and, as such, adopts opinions, decisions and recommendations relating to ART's entire area of competency, with the exception of decisions on sanctions. Currently it is composed of five permanent

members: a president and two vice-presidents appointed by decree of the President of the French Republic, and two vice-presidents appointed respectively by the President of the National Assembly and by the President of the Senate.

The members of the board are chosen for their economic, legal or technical competencies in the field of digital services and transport infrastructures, or for their expertise in competition, particularly in the field of network industries. The independence of the board is guaranteed, in particular, by the status of its members, who are appointed for a non-revocable and non-renewable six-year term.



The composition of the board has gradually evolved since the creation of ART in 2009 as the competencies of the regulator have been extended.

Main changes in the composition of the board since 2009

LAW N° 2009-1503

of 8 December 2009 on the organisation and regulation of rail transport and on various provisions relating to transport

- ✦ Composition limited to seven members, including a president, all appointed by decree. Three of the members other than the president are appointed by the President of the National Assembly, the President of the Senate and the President of the Economic, Social and Environmental Council respectively.
- ✦ With the exception of the president, one third of the members of the board is replaced every two years. The president is appointed for six years.

LAW N° 2014-872

of 4 August 2014 on railway reform

- ✦ Composition limited to seven members appointed by decree, including three permanent members (one president and two vice-presidents) appointed by the President of the French Republic and by the presidents of the National Assembly and the Senate, and four non-permanent members appointed by the Government.

LAW N° 2019-1428

of 24 December 2019 on mobility orientation (LOM)

- ✦ Creation of two additional seats of vice-presidents, appointed by decree of the President of the French Republic on the proposal of the Government, bringing the number of permanent members to five.
- ✦ Non-permanent members are not replaced at the end of their terms.

From left to right, top:

Henri Lamotte, Jacques Bernot,
Jean Puech, Dominique Bureau
and Daniel Tardy

From left to right below:

Claude Martinand and Pierre Cardo



2010
2012

2012
2014



From left to right, top:

Michel Savy, Jean-François Bénard,
Dominique Bureau, Henri Lamotte
and Daniel Tardy

From left to right below:

Anne Bolliet and Pierre Cardo

From left to right:

Jean-François Bénard, Marie Picard,
Pierre Cardo, Anne Yvrande-Billon,
Michel Savy, Yann Pétel
and Anne Bolliet



2014
2016

2016
2018



From left to right, top:

Marie Picard, Yann Pétel,
Cécile George, Anne Bolliet
and Michel Savy

From left to right below:

Anne Yvrande-Billon
and Bernard Roman

From left to right:

Philippe Richert, Marie Picard,
Bernard Roman, Anne Yvrande-Billon,
Cécile George and Yann Pétel



2018
2020

2020
2022



From left to right: Marie Picard,
Florence Rousse, Philippe Richert,
Bernard Roman, Sophie Auconie,
Patrick Vieu and Cécile George

From left to right: Florence Rousse,
Philippe Richert, Sophie Auconie
and Patrick Vieu



2022
2023

2024



From left to right: Patrick Vieu,
Florence Rousse, Thierry Guimbaud,
Philippe Richert and Sophie Auconie

Current board

From left to right: Sophie Auconie,
Thierry Guimbaud, Florence Rousse
and Patrick Vieu



2010 | 2016



Pierre Cardo

President



*The establishment of ART
and the initial work*

Appointed President of the brand-new Autorité de régulation des activités ferroviaires (ARAF) in 2009, Pierre Cardo's mandate laid the foundations for economic rail regulation in France. Under his mandate, ARAF was able to assert its independence and gradually established itself in the institutional landscape and among transport stakeholders. In 2015, with the expansion of its powers to the motorway concession sector and road passenger transport, ARAF became the Autorité de régulation des activités ferroviaires et routières (ARAFER), marking a first step towards multimodal regulation.

2016 | 2022



Bernard Roman

President



*The expansion of competencies
and the transition
to a multimodal regulator*

Under the presidency of Bernard Roman, the sectoral regulator consolidated its role among the stakeholders in the transport sector. As ARAFER was making major progress in the proper functioning of transport in the sectors for which it was already responsible, in 2019 the legislator extended its powers to major airports, urban public transport in Île-de-France and mobility digital services. Having become the Autorité de régulation des transports (ART), the regulator continued its action in favour of mobility in a context disrupted by successive crises, in particular the health crisis and the return of inflation.

2022 | 2023



Philippe Richert

Acting President



*Consolidation of the role
and missions of ART*

The regulator now having a set of levers to contribute to the proper functioning of the six sectors covered by its area of activity, the seventeen-month acting presidency of Philippe Richert proved that ART was established in its ecosystem and was being listened to. By extending the dialogue with its stakeholders and confirming its technical, financial and legal expertise, the regulator has endeavoured to continue its work on the challenges of ecological transition, price control and quality of service that affect the transport sector.

SINCE 2024



Thierry Guimbaud

President



*The transition
to 'Act II' of regulation
for better mobility*

Building on the work accomplished and the expertise acquired since its creation in 2009, and with the tools specific to economic regulation, ART, under the leadership of Thierry Guimbaud, aims to contribute to the development of sustainable mobility, following the main orientations of transport policy. ART has thus adopted a strategic project that will guide its action until 2029, taking into account the issues specific to each of the regulated sectors and the concerns of citizens, such as the accessibility of transport, the quality of infrastructure and service provided to users, the ecological transition, and regional planning.

ART's values

Public interest, impartiality, dialogue and expertise, which have always inspired ART's activities, are today the core values that guide its daily work.

Public interest

ART, as a public authority, carries out missions serving the public interest.

The daily commitment of ART's teams directly benefits users of regulated transport infrastructures and services: mobility organising authorities, transport companies and end users.

More broadly, ART promotes an internal work culture based on the quality of individual and collective work, collaboration and continuous improvement, allowing everyone to be a full participant in the collective success and achievement of ART's objectives.

The collective value of the missions entrusted to ART is a driving force for ensuring its employees remain motivated and committed.

Impartiality is a fundamental value of ART, which reflects a desire for neutrality and fairness in the treatment of stakeholders, as are objectivity and transparency in its decisions and opinions.

ART conducts its analyses impartially, taking into account the positions of all stakeholders during its operations.

Independence vis-à-vis all stakeholders in the sector is a sine qua non condition of this impartiality. It implies an important responsibility for ART and presupposes the securing of its financial and human resources.

Internally, impartiality is the collective line of conduct, guaranteed by compliance with the rules of ethics that apply to all.

Impartiality

Dialogue

ART is committed to conducting an open, constructive and regular dialogue with all stakeholders in the sector.

This dialogue is essential to enrich its opinions and decisions, and to enhance its understanding of the regulated sectors.

Public consultations and hearings provide an opportunity to gather stakeholder insights on specific issues. ART also strives to consult the stakeholders concerned before publishing its reports and studies.

More broadly, listening and dialogue are practices that ART attaches great importance to, both in its internal operations and in its daily interactions with stakeholders.

To guarantee the reliability of its work, ART combines knowledge of the transport sector, methodological rigour and know-how.

Combining varied competencies - economic, legal, financial, sectoral, data analysis - ART's board and its services ensure the quality of all its decisions, studies and recommendations, thereby guaranteeing the reliability of the data mobilised, the objectivity of its analyses and the rigour of its methods and reasoning, whether legal, economic or financial.

ART has a particular interest in maintaining and constantly developing the competencies of its teams in order to continuously address the new challenges of the sector.

Expertise

A regulator anchored in its ecosystem

Over the years and with the expansion to new sectors, ART has developed relations with stakeholders (public authorities, economic operators, representative organisations of the sector, etc.) at both national and European level. Relations with its ecosystem are essential to carry out its missions.

ART and its ecosystem



Institutional actors and transport authorities

(European institutions, Parliament, Government and State services, transport authorities)



Participation of Philippe Richert, Acting President of ART, at the Symposium of Rail Transport and Intermodality organised by Regions of France, 18 December 2023.

Hearing of Thierry Guimbaud (centre), President of ART, by the Senate Committee on Regional Planning and Sustainable Development, chaired by Jean-François Longeot (left) on the regulation of motorway concessions and rail transport, 28 May 2025.



Bernard Roman, President of ART (front), Yann Pétel, Cécile George, members of the board, Anne Yvrande-Billon, Vice-President, Marie Picard, member of the board, Richard Ferrand, President of the National Assembly and Philippe Richert, Vice-President (from left to right), during the 10 years of ART at the National Assembly, 29 January 2020.





Academic partners

(such as the economic and regulatory law research teams at the Paris and Toulouse Schools of Economics and Paris-Dauphine University, in particular)



Anne Yvrande-Billon, Vice-President of ARAFER and representatives of European rail regulators at the IRG-Rail plenary assembly in Paris, 12 April 2017.



Pierre Cardo (right), President of ARAF and Jean Tirole (left), President of the Toulouse School of Economics, during the economic conference organised by ARAF, 26 May 2013.



National and European regulators

(such as ADLC, CRE or ARCEP*, European groups of railway and airport regulators, Office of Rail & Road, in particular)



End users

(passengers and carriers)



Interview of Patrick Vieu, Vice-President of ART, on BFM Business on motorway concessions, 27 January 2023.



Visit by Florence Rousse, Vice-President of ART, to the control tower and the approach lounge of Paris-Charles de Gaulle Airport, 11 July 2023.



Economic actors in the sector

(infrastructure managers, transport operators, users of regulated essential facilities)



Participation of Sophie Auconie (centre), Vice-President of ART, at the 2025 Mobility Data Meetings, 13 June 2025.

2.

**15 years of action
and tangible results
for citizens
and the economy**

In accordance with its missions as a sectoral economic regulator, ART has worked since its creation to promote a competitive and efficient transport sector in the interest of users and operators using transport infrastructure. Its work has led to tangible results for the benefit of citizens and the economy.



€700 million

Since it has been responsible for the motorway concession sector, ART has enabled motorway users to benefit from savings of more than 700 million euros, including savings of 400 million euros on fuel distribution and 300 million euros on tolls, equivalent to 15% of the increases that were initially envisaged.



2,279

This is the number of intentions to operate a new road passenger transport service notified to ART since October 2015, when the arrival of new operators on the French road network became possible. Since the liberalisation of these services, this new transport offering has allowed users to travel throughout France at low prices and with a reduced environmental impact.



€76 million

Since taking over responsibility for the airport sector in 2019, ART has limited increases in prices paid by airlines for their use of airport infrastructure by nearly 76 million euros.



- 3,5 %

This is the percentage decrease in the hourly rate of the daily security services provided by RATP's Network Protection and Security Group (Groupe de protection et de sécurité des réseaux - GPSR), approved by ART for the year 2024, compared to the initial proposal. ART's work aims in particular to verify that RATP takes into account the concept of an efficient operator in the development of its security service prices.



35 % & 134 %

ART's action concerning mobility digital data has contributed, since the first controls in 2022, to a 35% increase in published data concerning the scheduled timetables of public transport, and an almost complete coverage of public services and private operators in France. This action is even more important with regard to real-time data (actual transit times and disruptions), the publication of which increased by 134% between 2022 and 2025, thus making it possible to provide reliable information to travellers.



51

This is the number of intentions to operate a new rail service notified to ART since December 2020, when the arrival of new railway undertakings on the French network became possible with the opening up of rail passenger transport services to competition. These new services are likely to promote an increasingly more tailored response to the needs of travellers (connection, price, punctuality, quality of service, on-board services, etc.).

3.

Progress and achievements in the six transport sectors

Rail sector

Since its creation, ART has supported the opening up of rail passenger transport services to competition and has worked to improve the governance and performance of the essential infrastructure of the rail system. It promotes the effective and optimal use of the network by passenger and freight railway undertakings within the financial framework determined by the public authorities.

Key figures



419 opinions and decisions

issued by ART in the rail sector
since its creation



8 editions

of the report on observation
of the French rail transport market



13 contributions

to the IRG-Rail market observation report



10 lots

of contracted services awarded following
a competitive tender, out of around
fifty planned for mid-2025



15 %

increase in train use since 2019

ART's major achievements in the rail sector

As the opening up to competition has become a concrete reality in France, ART continues to use the tools at its disposal to ensure the successful development of the rail transport market. Through its powers of opinion, whether legally binding or not, dispute settlement and sanction, the regulator has actively contributed, since its

creation, to the establishment of pricing and operational conditions favourable to opening up to competition. This has materialised with the arrival of alternative operators for freely organised services since 2021, and for public service obligation services (PSO) since 2025.

ART's action relating to the financial and industrial performance of SNCF Réseau

The performance contract, entered into between SNCF Réseau and the State, aims to implement the rail network's management policy and the development strategy, the guidelines of which are defined by the State. In this respect, it constitutes an essential element of the economic regulation of railway infrastructure, as well as for ensuring stakeholder confidence in the railway system, through the transparency it must provide.

In this context, ART's work makes it possible to contribute to the proper functioning of the rail system and to encourage the infrastructure manager to achieve greater performance.

✦ The regulator issued two opinions in 2017 and 2022, concerning, respectively, the 2017-2026 and 2021-2030 draft performance contracts.

✦ Consulted on monitoring the implementation of the contract and on its proposed update for the period 2017-2026, ART formulated a number of recommendations, noting that the document had shortcomings, in particular the financial trajectories, which were not very credible or auditable.

✦ For the period 2021-2030, ART was consulted twice on monitoring the implementation of the contract and formulated recommendations as part of updating the future contract so that the performance contract becomes the central tool for governance of the network, as it should be.

² Opinion No 2017-036 of 29 March 2017 on the draft multi-year performance contract between the State and SNCF Réseau for the period 2017-2026 and Opinion No 2022-009 of 8 February 2022 on the draft performance contract between the State and SNCF Réseau for the period 2021-2030.

³ Opinion No 2018-035 of 14 May 2018 on the implementation for 2017 of the multi-year performance contract entered into between the State and SNCF Réseau for the period 2017-2026, Opinion No 2019-038 of 20 June 2019 on the implementation for 2018 of the multi-year performance contract entered into between the State and SNCF Réseau for the period 2017-2026, and Decision No 2019-039 of 20 June 2019 on the recommendations formulated as part of the updating of the multi-year performance contract entered into between the State and SNCF Réseau for the period 2020-2029.

⁴ Opinion No 2024-030 of 30 April 2024 on the implementation for 2023 of the multi-year performance contract entered into between the State and SNCF Réseau for the period 2021-2030, and Opinion No 2025-042 of 6 May 2025 on the implementation for 2024 of the multi-year performance contract entered into between the State and SNCF Réseau for the period 2021-2030.

⁵ Decision No 2024-002 of 18 January 2024 on the recommendations made by the Authority in the context of the updating of the performance contract entered into between the State and SNCF Réseau for the period 2021-2030.

Noting the absence of a target vision for the network in the draft contract for the period 2021-2030, ART wished to clarify the public debate by carrying out prospective work aimed at presenting the foreseeable changes in the scope of the network over the next 20 years, in accordance with the means mobilised. In July 2023, it published a study on long-term scenarios for the French rail network⁶ in which two scenarios were explored.

- ✦ ART emphasised that maintaining the investment trajectories provided for in the 2021-2030 performance contract for the renewal and modernisation of the network would lead the infrastructure manager into a spiral of industrial impoverishment.
- ✦ Conversely, the 'ecological transition' scenario would make it possible to rejuvenate and modernise the infrastructure, thus preserving the bulk of the current network, and to initiate

a virtuous cycle aligned with the objectives of the ecological transition of transport. This second scenario corresponds in particular to an increase of 1.5 billion euros (2021 value) on average over the 2022-2042 period of investments in favour of the regeneration and modernisation of the network.



The regulator continues to closely monitor the evolution of the infrastructure manager's performance as part of its various opinions and studies, formulating recommendations aimed at ensuring a sustainable financial trajectory and improving the efficiency of network management. Its recommendations also relate to the quality of the service provided, ensuring the relevance of performance indicators, the transparency of costs and the implementation of incentive mechanisms to promote better productivity.



⁶ Report on the long-term scenarios for the French rail network (2022–2042).

Pricing levers for the modernisation of the rail network

Pricing levers must make it possible to meet the massive needs for investment in the regeneration and modernisation of the network while promoting optimal infrastructure use.

The pricing system for access to railway infrastructure is based on a balance between, on the one hand, its effective and optimal use so as not to exclude traffic capable of paying at least the directly attributable cost, and, on the other hand, the widest possible self-financing of investments in the regeneration and modernisation of the network by its manager.

The opening up of freely organised rail transport services to competition is likely to improve this balance by increasing the number of services and, consequently, the associated revenues, while controlling the development of rail tolls.

The regulator has three levers to contribute to the proper functioning of the rail system in terms of pricing:

- ✦ verifying that the proceeds from tolls do not exceed the full cost of managing the infrastructure, which constitutes the ceiling, by demanding that SNCF Réseau justifies its costs;
- ✦ ensuring that this cost is that of an efficient operator for a given level of service quality, that is to say that SNCF Réseau is an efficient infrastructure manager;
- ✦ promoting changes in the pricing structure that allow effective and optimal use of the network.



On this last point, ART has ensured, as part of the 2024-2026 pricing cycle, that the dynamic indexation of tolls is accompanied by a profound change in the structure of rail tolls. In particular, SNCF Réseau has implemented:

- ✦ for freely organised services, greater differentiation of tolls according to the contributory capacity of traffic ('Ramsey-Boiteux' type pricing). In practice, tolls can thus range from single to triple on the high-speed line between Paris and Lyon, depending on the timetable and the size of the trains;
- ✦ for PSO services, two-component, so-called binomial, pricing: each vehicle in traffic pays only the cost directly attributable to it, and the fixed costs are covered by the payment of a flat rate for the provision of the infrastructure.

However, rail tolls, which are historically higher in France due to the choices made by the public authorities, can constitute a barrier to entry into the market, which also requires very significant investments, in particular for the purchase of rolling stock. In order to facilitate the arrival of new entrants, European Union and national law allows the infrastructure manager to grant them temporary reductions in the applicable tolls, subject to not contravening the principles of pricing for access to the infrastructure.

As such, the negotiated pricing tool makes it possible to promote the development of new services and the effective and optimal use of the network. This mechanism allows a candidate to negotiate the level of charges with the infrastructure manager, under the control of the regulator.

The regulator intervenes to verify that the pricing negotiated between the infrastructure

manager and the railway undertaking complies with certain conditions, in particular (i) it is not likely to hinder access to the network or the development of competition, (ii) it does not run counter to the principle that access to the national rail network must be granted in a fair and non-discriminatory manner, and (iii) it is consistent with the economic, financial, legal and technical constraints of the infrastructure manager and railway undertakings.

Since the implementation of this tool in France, the regulator has issued four opinions in accordance with prices negotiated between SNCF Réseau and railway undertakings:

- ✦ in May 2022 for Trenitalia France's high-speed offer between Paris and Lyon;
- ✦ in December 2023 for Trenitalia France's high-speed offer between Paris and Modane via Lyon;
- ✦ in November 2023 for Renfe Viajeros passenger transport services between Marseille and Madrid and between Lyon and Barcelona;
- ✦ in May 2025 Trenitalia France's high-speed offer between Paris and Marseille.

SNCF Réseau has already received between €50 and €100 million in additional price increases, all other things being equal, thanks to the entry of new stakeholders into the rail system.

ART's levers to ensure fair, non-discriminatory and transparent access to the rail network

As the railway infrastructure is operated as a monopoly, exercising effective competition presupposes that railway operators can access the national rail network in the downstream market for passenger and freight transport services. European Union law⁷, transposed into national law, thus provides, on the one hand, that railway operators have a right of access, under fair, non-discriminatory and transparent conditions, to railway infrastructure and, on the other hand, that the capacity allocation system allows its manager to market the available capacities and to make effective and optimal use of them.

In this context, the regulator has a keen interest in the operational conditions for accessing the network from which railway undertakings actually

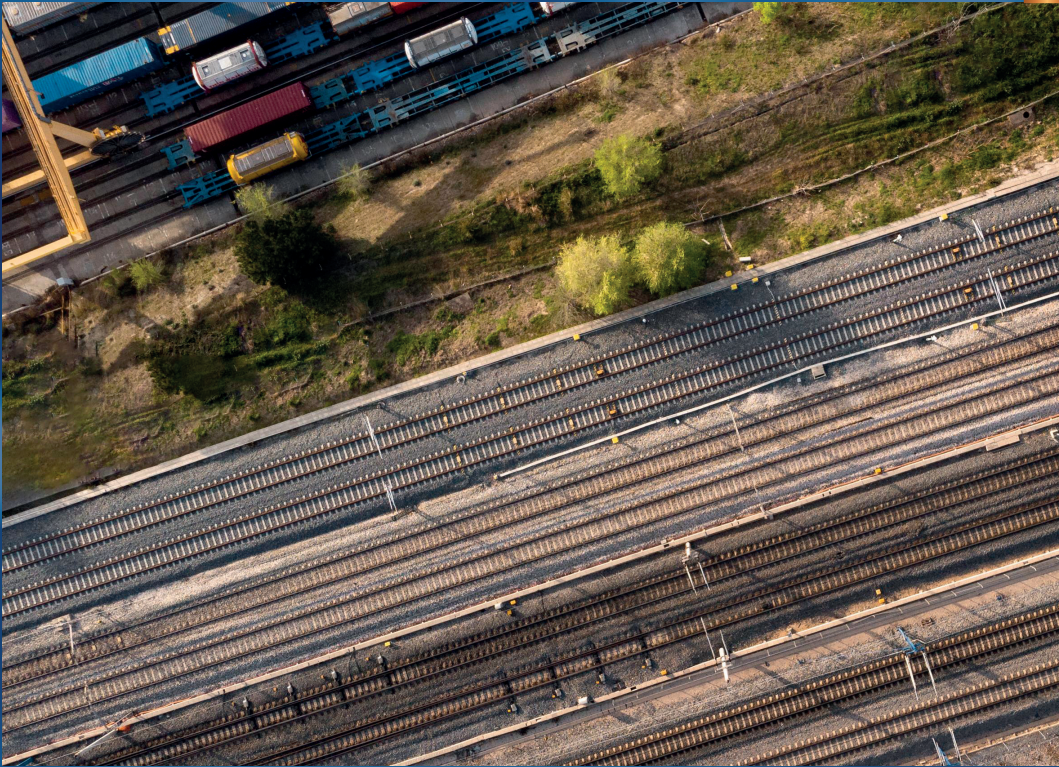
benefit, and has various levers, which may be legally binding (opinions, injunctions, 'reciprocal incentives' mechanism, sanctions) or not (reasoned opinions, studies), in order to improve management methods and access to train paths.

✦ On the one hand, with regard to legally non-binding levers, ART issues a reasoned opinion on the access conditions appearing in the network reference document published each year by SNCF Réseau, such as the allocation of train paths, a central issue for the construction of a transport offering – freight or passengers. More broadly, ART has endeavoured to examine these conditions in various studies⁸.



⁷ In particular, Directive 2012/34/EU of the European Parliament and of the Council of 21 November 2012 establishing a Single European Railway Area.

⁸ In particular, the study on 'On-board safety equipment, at the time of the opening up of rail transport services on high-speed lines to competition', published in July 2022, the study on 'The use of sidings' published in November 2022, and the study on 'Framework agreements for the French rail system' published in November 2023.



✦ **On the other hand, ART has a number of legally binding levers.**

- ✦ Complaints lodged by four freight companies in 2013 led to the creation in 2014 of a 'reciprocal incentives' mechanism and its implementation from 2015, encouraging both the infrastructure manager and railway undertakings to return unused train paths as soon as possible at the risk of penalties being applied. In a few years, this mechanism has made it possible to reduce the number of train path modifications by almost half, all causes combined.
- ✦ ART also ordered SNCF Réseau, following a dispute settlement reached in July 2022⁹, to put in place an incentive mechanism for the effective use or express return of capacity reserved for the works. Finally, in June 2023, ART sanctioned SNCF Réseau to the tune of two million euros for failing to comply with its obligation to justify refusals to allocate train paths¹⁰.

FOCUS

⁹ Decision No 2022-059 of 28 July 2022 settling disputes between Captrain France, T3M, Europorte France, and Régiorail and SNCF Réseau concerning procedures related to the allocation of train paths, the supervision and use of infrastructure capacities reserved for works and the principles and procedures for compensation.

¹⁰ Decision No CS-2023-001 of 27 June 2023 of the ART Sanctions Committee.

Road passenger transport by coach

Since 2015, ART has supported opening up intercity road passenger transport by coach, called 'Macron coaches' during liberalisation, to competition¹¹. The regulator ensures that the rules for access by long-distance coaches to coach stations are equitable and at fair prices. More generally, it ensures the proper functioning of this liberalised market for the benefit of users and customers.

Key figures

Fair and affordable access to coach stations...



Access rules for

over 100

monitored **coach stations**



Prices kept below

6 euros

on average for a touch

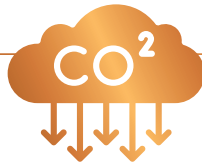


... enabling the growth of a sustainable and inexpensive mode of transport



€100 million

in savings per year for users
on their transport costs



**15,000
fewer tonnes of CO₂**

emitted due to the shift
from cars to coaches



10 editions

of the report on the observation of
the coach transport market
and coach stations in France

¹¹ Due to Law No 2015-990 of 6 August 2015 for growth, activity and equal economic opportunities, supported by Emmanuel Macron, Minister of Economics, Industry and Digital Affairs, known as the 'Macron Law'.

ART's major achievements concerning road passenger transport by coach

Since the liberalisation of the sector in 2015, ART has worked as a trusted third party between the various stakeholders in the sector, in particular with regard to access to coach stations. It has had to intervene on several occasions with managers of coach stations charging excessive prices, and has played the role of trusted third party to bring about a consensus between carriers and local authorities responsible for receiving long-distance coaches.

In 2019, the Mont-Saint-Michel dispute settlement: a 50% reduction in prices to reflect the fair price of the service

FOCUS

On 28 August 2019, FlixBus France submitted a request to ART for a dispute settlement relating to the price of accessing the Mont-Saint-Michel car park, as FlixBus considered this price to be too high. This amounted to €23 in low season and €32 in high season.

ART's work showed that this price did not reflect the costs of the service, and was therefore excessive. Indeed, the regulator's

investigation revealed that the cost of shuttles allowing visitors to connect the car park to Mont-Saint-Michel was covered, in particular, by the price of accessing the car park.

As a result, ART ultimately ordered the car park manager to set the access price at €11, an amount in line with the charges actually borne by the latter.

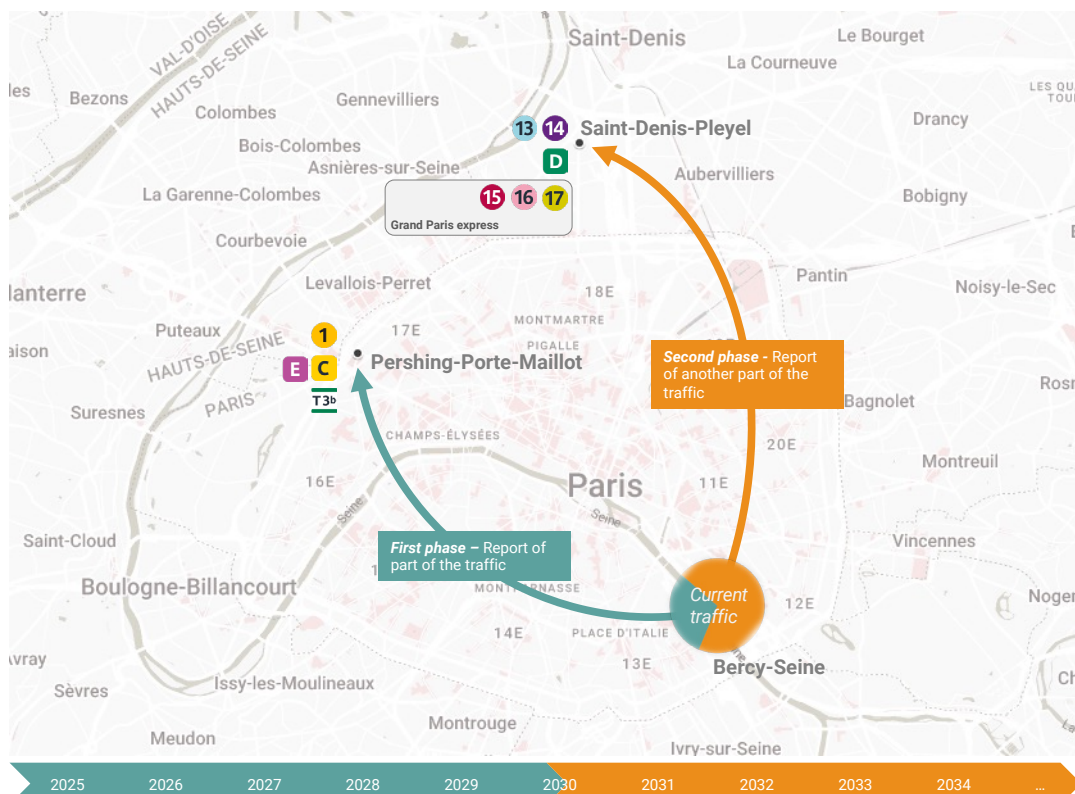
In 2024, the project to close the Bercy Seine station: mediation to define a strategy for receiving long-distance coaches

At the end of 2023, the city of Paris announced its intention to close the Bercy-Seine coach station. This decision posed a threat to the very existence of the sector: the first coach station in France, Paris-Bercy station alone welcomes about 30% of the passengers of freely organised coaches each year. Despite the services offered to passengers still being insufficient, it remains essential for carriers because it is the only large-capacity coach station in inner Paris.

ART has therefore undertaken a review of sites in the Paris region likely to receive coach traffic in order to define a long-term regional reception strategy. The work carried out with the stakeholders in the sector has made it possible to develop a scenario for the reorganisation of coach traffic that has achieved consensus. This scenario involves the Pershing-Porte Maillot, Douaumont and Saint-Denis Pleyel sites.

On the basis of this consultation work undertaken by the regulator, the prefecture of Île-de-France, in conjunction with the owners of the sites, was able to define a viable solution that meets the needs of users and ensures the sustainability of the long-distance coach offer in Île-de-France.

By 2030, this solution will consist of accommodating traffic at two sites: at Pershing-Porte Maillot and at a new station located in the Pleyel district of Saint-Denis. Until then, some traffic will remain at Bercy, while other traffic will be transferred to Pershing-Porte Maillot. The Douaumont site will retain its storage function.



Motorway sector

Since taking over responsibility for the motorway sector in 2016, ART has been using its expertise to increase transparency in the sector and rebalance relations between the State and motorway concessionaires. Its action has essentially had three concrete effects: substantial toll savings, more controlled fuel prices and restored competition for motorway works contracts.

Key figures



€300 million

in tolls saved

Concession contracts are regularly modified to have the concessionaire make investments not provided for in the contract (e.g. an interchange) in return for a toll increase. Since 2016, ART has counter-assessed 18 such modification projects and made numerous recommendations aimed at reducing user funding. Although the licensor did not ultimately follow all of these recommendations, ART's action nevertheless resulted in a toll reduction of €300 million.



Nearly

10 cents

less per litre of fuel

This is the saving achieved thanks to the regular competitive tendering of service areas according to ART's price moderation recommendations. Since 2016, more than 150 contracts for the distribution of fuel have been renewed: the resulting drop in the price of fuel should translate, by the end of the concessions, into savings of several hundred million euros for users.



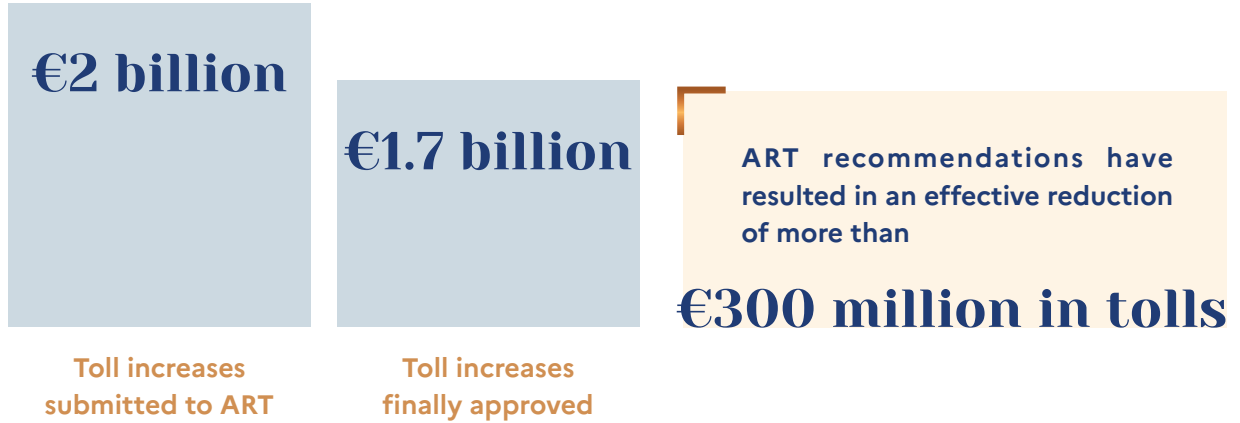
Around

€100 million

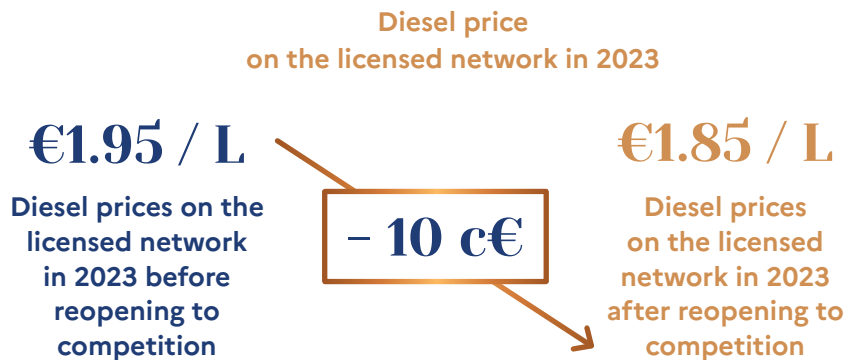
less in contracts awarded to related companies in 2023

In 2014, the Competition Authority noted that motorway companies – which are generally integrated into large public works groups – awarded a significant share of their works contracts to subsidiaries of these same groups. Under the effect of procurement procedures better supervised by ART, the share of works contracts awarded to related companies fell from 43% in 2017 to 28% in 2023: this is nearly €100 million less in contracts awarded to related companies. As the rate of allocation to related companies has risen since 2024, ART has initiated additional controls on this matter.

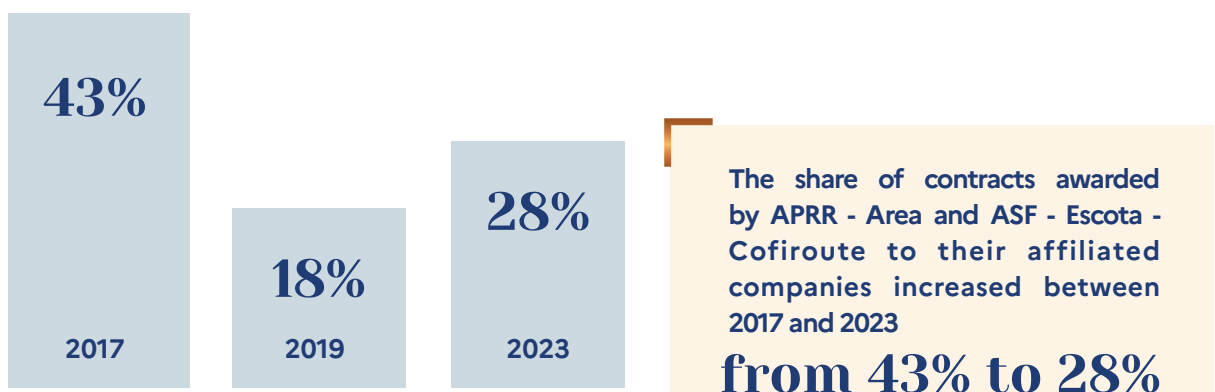
A public and independent second opinion on additional investments in the network under concession



More effective competitive tendering for service area operating contracts



Competition restored for motorway concession companies' works contracts



ART's major achievements in the motorway sector

In almost a decade, ART has supported major developments in the sector and concession contracts. In particular, it assisted the licensor State in implementing several major investment programmes. As the seven main concession contracts will expire between 2031 and 2036, ART has also drawn up comprehensive feedback on the concession model in order to identify its strengths, weaknesses and room for improvement: it thus contributes to building the future of the sector.

ART's two opinions on the western bypass of Montpellier have resulted in reduced tolls that were better targeted to the users concerned

The Montpellier Western Bypass (COM) is a project aimed at completing the Montpellier ring road while connecting two major axes, the A75 motorway which crosses the Massif Central and the A9 motorway along the Mediterranean arc. Specifically, it involves the redevelopment of 6 km of existing roads which, when commissioned in 2026, should accommodate 40,000 to 68,000 vehicles per day, depending on the sections. It will allow very significant time savings for its future users while also making the local road network more fluid.

ART assisted the licensor in creating the contracts for this project with the company Autoroutes du Sud de la France (ASF). It was thus presented with two proposed amendments, one in July 2022 and the other in July 2023, aimed respectively at including this investment in the concession contract. The opinions it issued helped shape the project on two points.

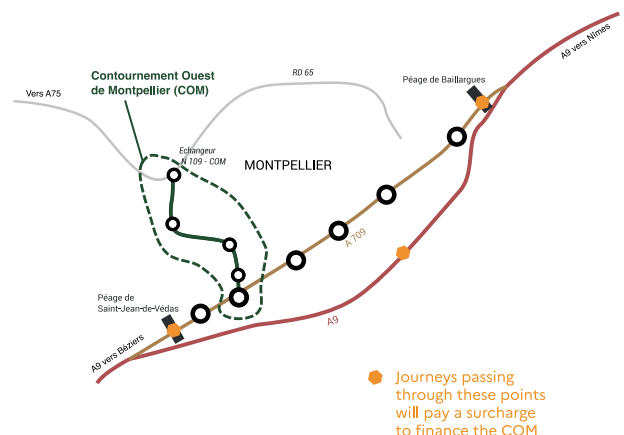
✦ **The toll increase requested by ASF to carry out the project was too high** due to poorly calibrated financial assumptions. For example, the operational costs of construction were overestimated by more than 10% and the traffic forecasts, the basis for compensation by increasing toll rates, were particularly pessimistic.

✦ The toll increase, initially planned at €300 million, has dropped to €230 million, representing savings of €70 million. ART had nevertheless

recommended a greater reduction, in particular with regard to construction costs, which are still being overestimated in its opinion.

✦ **The financing of the project was not based on the users of the infrastructure.** Initially, the licensor wanted to introduce a generalised toll increase on the 2,700 km of the ASF network. Therefore, the users of the COM would not have been the financiers because less than 1.5% of vehicles making a toll journey on the ASF network will use the COM.

✦ The toll increase was better targeted. The toll increase will be limited to journeys using the full-lane toll gates of the A709 motorway (Baillargues and Saint-Jean-de-Védas) and to those using the A9 motorway near Montpellier.





The report on the general economy of motorway concessions published in 2024 analyses the actions to be taken to finalise the contracts under the right conditions

The seven main concession contracts will expire between 2031 and 2036: completing them properly is a necessary condition to sustain the concession model. The third report on the general economy of concessions, published by ART in December 2024, aimed to identify the main projects to be carried out. It drew up two observations and identified two actions to be taken.

First observation: It must be ensured that the concessionaires will return the motorway infrastructure in good condition. This is essential because at the end of the contract, concessionaires are less incentivised to carry out the necessary work. The financial stakes are significant: on the one hand, simply maintaining the network in its current state requires €800 million per year and, on the other hand, the treatment of certain specific works known as 'evolving' – which today have minor defects but are likely to deteriorate rapidly – will require an additional €1.2 billion.

ACTION TO BE TAKEN

Define a stringent maintenance and renewal programme and notify the concessionaires.

Second observation: not all of the so-called 'second phase' investments have been made.

The contracts provide for the completion of certain motorway improvements to be carried out in two stages (for example, the construction of a 2x2-lane motorway section initially, then a widening to 2x3 lanes in a second stage). However, there is no consensus on the scope of the obligations relating to these second-phase 'investments', more specifically on the question of whether these investments are

in any event payable without compensation by the licensor at the latest by the end of the contract. The stakes are high: between 0.4 and 5.1 billion euros of investment could be due by the concessionaires depending on the interpretation of the contractual clauses. In the event that certain developments no longer appear justified today from a technical and economic point of view, these amounts could be reused for purposes other than the widening, for example to finance the adaptation of the network to the needs of everyday mobility or the decarbonisation of motorways. According to ART, there are strong legal arguments in favour interpreting the contractual obligations of motorway concessionaires in the strictest possible manner.

ACTION TO BE TAKEN

Rule on the extent of the investment obligations that are still the responsibility of the concessionaires.



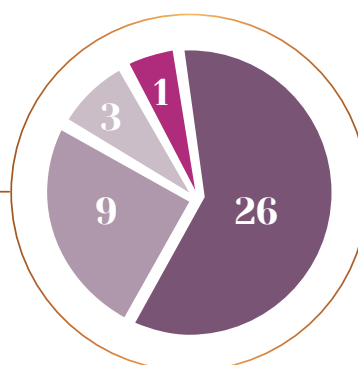
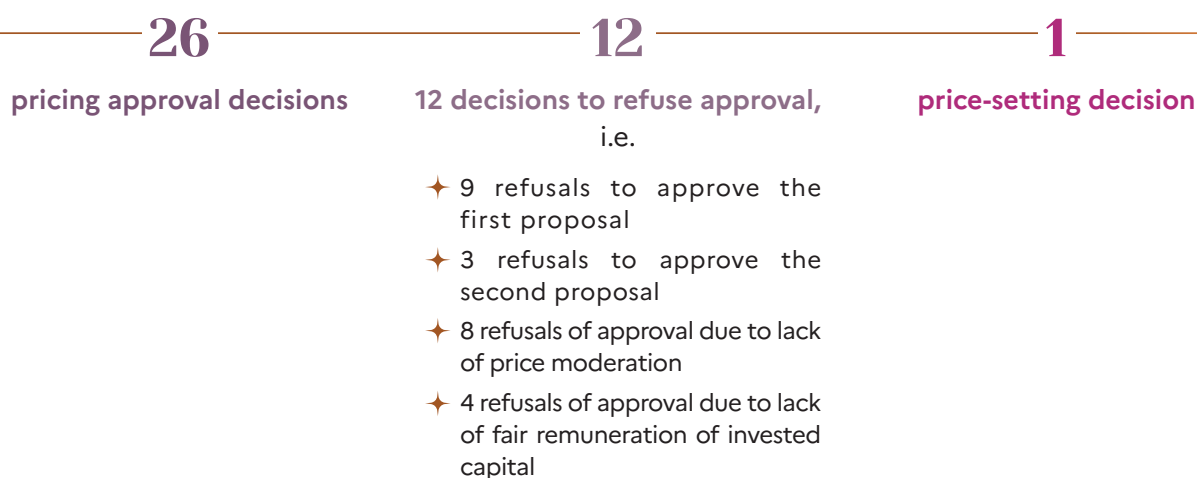
Airport sector

Since 2019¹², ART has been responsible for economic regulation of the main French airports. Its role is to ensure that this essential infrastructure, often being a natural monopoly due to its strategic position and its importance in the transport network, does not impose excessive pricing on airlines for the airport services provided, and is incentivised to perform in terms of costs and quality of service.

Key figures



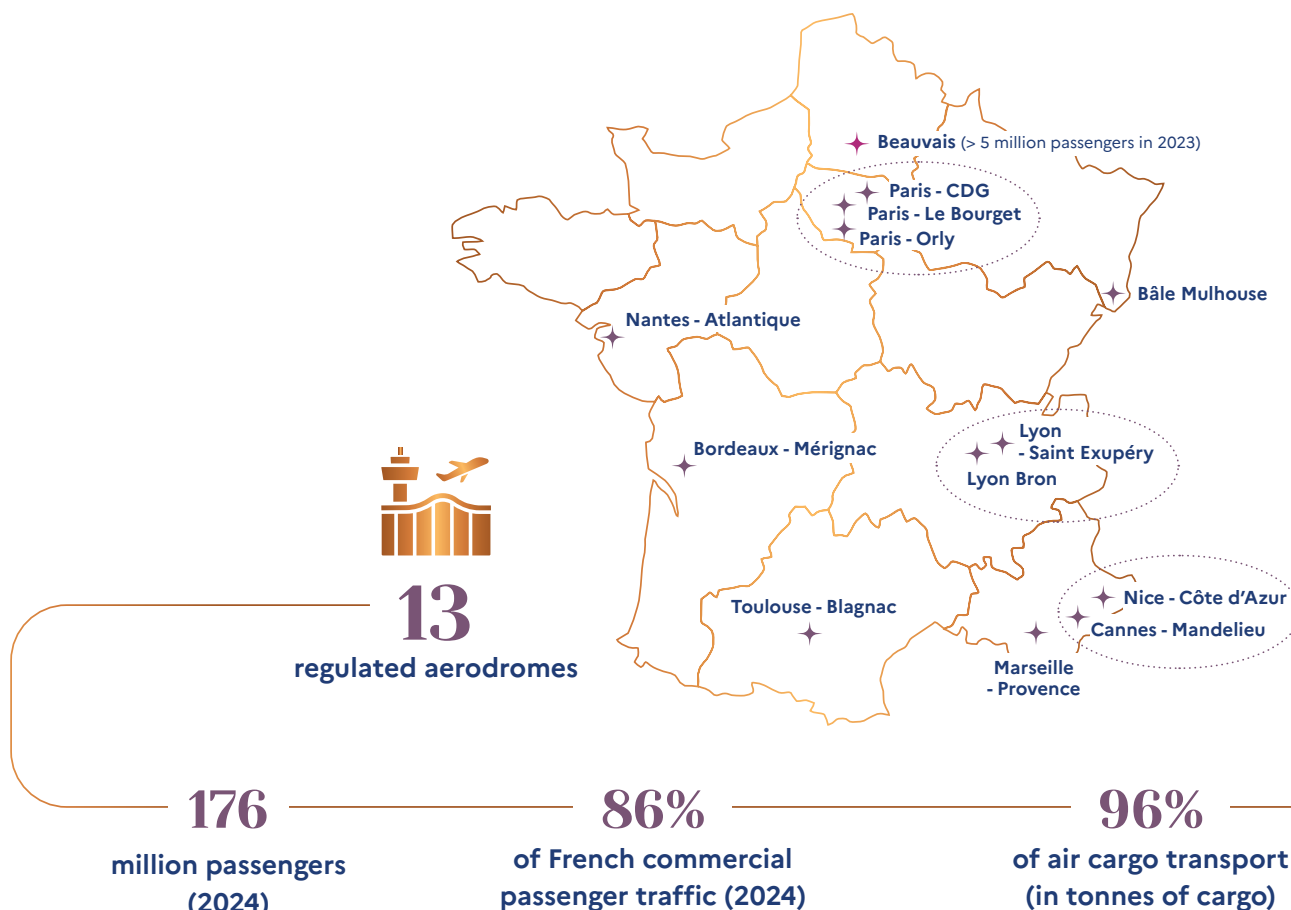
39 decisions
relating to annual approvals*



- ✦ Refusal of approval (second proposal)
- ✦ Refusal of approval (first proposal)
- ✦ Tariff setting
- ✦ Approvals

¹² Until the end of the 2000s, the State directly validated airport charges. The European Directive 2009/12/EC imposed the creation of an independent supervisory authority (ISA) to guarantee impartiality and transparency, while leaving the states wide freedom of organisation. In France, after a first attempt entrusted to the DGAC (Directorate General for Civil Aviation) in 2011, deemed insufficient by the Council of State in 2015 with regard to the impartiality obligations established in the 2009 directive, an ISA was established in 2016 and then made autonomous in 2017. In 2019, its powers were transferred to ARAFER by Order No 2019-761 of 24 July 2019, which entrusted the powers of the ISA to ARAFER, thus giving rise to the new transport regulatory authority which became ART.

* Key figures as of 30 June 2025.



ART's major achievements in the airport sector

Since taking over responsibility for the airport sector in 2019, ART's regulatory action has protected airlines, who are in competition with one another, from the excessive effects that the airport operators' monopoly may exert.

To this end, ART has endeavoured to clarify the main principles of airport price regulation¹³:

- ✦ **the principle of price moderation:** in accordance with the applicable legislative provisions, one of the regulatory objectives pursued by ART is to ensure that the change in the level of airport charges provided for in a price proposal is moderate so as to, in particular, protect airlines from excessive price increases. ART has thus refined its doctrine concerning the principle of price moderation through several decisions to refuse to approve price proposals submitted by airport operators, which have been upheld by the Council of State¹⁴ ;
- ✦ **the principles of allocation of assets, income and expenses to the regulated scope** within the framework of a decision with a regulatory scope and associated guidelines¹⁵ ;
- ✦ **the principle of fair remuneration of capital invested** by airport operators.

¹³ France is subject to three levels of regulation: the international regulation of the International Civil Aviation Organization (ICAO), which lays down four key principles for the establishment of charges (non-discrimination, relationship with costs, transparency and consultation of users), the European regulation (Directive 2009/12/EC), which defines a common base of economic regulation, and the national regulation, which entrusts the regulation of airports with more than five million passengers to ART.

¹⁴ EC, 28 December 2021 Req No 450025, 7th and 2nd chambers together) the rejection of the action for annulment brought by Aéroports de Lyon (ADL) against two of ART's decisions of 22 December 2020 and 11 February 2021.

¹⁵ Decisions No 2022-024 and No 2022-025 of 31 March 2022.

ART has published guidelines to provide a stable and sustainable environment for airport investments

As part of its control over airport charges, ART verifies in particular that the capital invested in the regulated scope of activities benefits from 'fair remuneration', having regard to market expectations and taking into account the risks specific to the activity. This verification is carried out in comparison with a weighted average cost of capital (WACC) calculated within this scope.

Although the main principles for determining the WACC are laid down by law, different methods of calculation are possible, without a consensus being reached either in the financial literature or among practitioners and stakeholders in the sector (airport managers and airlines).

In an opinion issued in February 2020¹⁶, ART set out the methodological framework it had adopted, after consultation with stakeholders

of the sector, for determining the WACC of the regulated perimeter of airports falling within its jurisdiction.

In 2023, following a broad consultation with stakeholders, ART adopted guidelines¹⁷ to update its methodology for calculating the WACC for the scope of regulated airport activities in response to a disrupted macroeconomic context. These guidelines, which were reinforced by a decision of the Council of State of 10 July 2025¹⁸, aim to contribute to the establishment of a stable, robust and sustainable environment in terms of economic regulation, capable of promoting effective investments in French airport infrastructures, in the interest of users.

FOCUS

2019
NOVEMBER

From its initial referral, ART refused to approve the prices proposed by Aéroports de la Côte d'Azur (ACA), considering that they disregarded the principle of fair remuneration of capital.

2020
FEBRUARY

ART adopted its scoping opinion on the WACC to be taken into account for the ADP economic regulation contract (CRE) project over the period 2021-2025.

2020
JULY-SEPTEMBER

ART published a public consultation on the assessment of WACC levels for the regulated scope of airports with more than 5 million passengers.

2024
JULY

After having twice refused the price proposals of Aéroports de Lyon (ADL) and considering that the latter benefited from very high remuneration of its capital, ART, for the first time, used its price setting competency to impose a significant reduction in passenger charges (-41% for the passenger charge).

2023
NOVEMBER

ART adopted its guidelines on the methodology for calculating the WACC.

2023
OCTOBER

ART refused to approve the prices of Basel-Mulhouse airport despite the proposal for a price freeze for the period beginning on 1 January 2024, considering that they disregarded the principle of fair remuneration of capital.

¹⁶ Opinion No 2020-017 of 17 February 2020 on the weighted average cost of capital to be taken into account for the draft economic regulation contract of Aéroports de Paris (ADP) over the period 2021-2025.

¹⁷ Decision No 2023-052 of 9 November 2023 adopting guidelines relating to the assessment of the weighted average cost of capital (WACC) levels of the regulated scope of airports falling within Autorité de régulation des transports' area of competency.

¹⁸ Decision No 494869, 498095, 500666, 2nd and 7th chambers meeting, 10 July 2025.

¹⁹ Decision 2023-051 of 26 October 2023 relating to the application for approval of the airport charges for Basel-Mulhouse airport from 1 January 2024.

²⁰ By its Decisions No 2024-007 of 25 January and No 2024-023 of 21 March 2024, ART twice refused to approve the pricing proposals applicable to Lyon Saint Exupéry and Lyon-Bron airports. By its Decision No 2024-054 of 11 July 2024, it decided to set the prices for one year from 1 September 2024.

Since taking over, ART has been keen to contribute to improving the regulatory framework of the airport sector in order to make it more efficient and transparent.

ART has gradually contributed to improving the airport regulatory framework

In accordance with its role of shedding light on the public debate, in September 2023, ART formulated concrete recommendations as part of its report on the 'recommendations for the development of the airport regulatory framework', which were largely included in the reform implemented by the Government between the end of 2023 and mid-2025:

- ✦ making economic regulation contracts (CRE) the cornerstone of airport regulation based on a multi-year approach;
- ✦ putting in place a balanced cash management model for large airports as part of the transition to a CRE;
- ✦ strengthening the involvement of the regulator and users in the development of CRE, in particular by changing the way the economic advisory committees (CoCoÉco) operate.

The announced changes have resulted in several legislative and regulatory developments²¹, allowing ART to give a non-binding opinion on the preliminary drafts of the CRE as well as an opinion on the continued execution of the CRE beyond five years.

Beyond this, ART has fostered the development of its competencies in a way that allows its work to be more effective. Between 2021 and 2025, the legislator thus entrusted it with:

- ✦ the power to set, by a decision published in the Official Journal of the French Republic, the principles that must respect the rules for the allocation of assets, income and expenses within the regulated scope for airports falling within its area of competency;
- ✦ an economic and financial monitoring assignment for airports within its area of competency, which has resulted in an annual publication since 2023;
- ✦ the power to give a non-binding opinion on draft regulatory texts relating to the regulation of airport charges.

²¹ In particular, Laws No 2024-364 of 22 April 2024 and No 2025-391 of 30 April 2025 on various provisions for adaptation to European Union law (DDADUE), the Order of 23 May 2024 on charges for services rendered at aerodromes and Decrees No 2025-377 and 2025-378 of 25 April 2025 on airport charges.

Urban public transport in the Île-de-France region

ART regulates the activities carried out by the Parisian Autonomous Transport Administration (Régie Autonome des Transports Parisiens - RATP) as infrastructure manager of the historic metro and Regional Express Network (Réseau Express Régional - RER) and technical manager of the Grand Paris public transport network. It also regulates the security services implemented by the RATP's internal security service.

Key figures



11
**opinions and
decisions**

issued by ART since 2021 as part of its mission to economically regulate urban public transport in Île-de-France.



200 km

of the future public transport network of the Grand Paris Express, which began operating in 2024 and was planned to be opened to competition from the outset.

ART's major achievements concerning urban public transport in the Île-de-France region

ART's sectoral economic regulator's role is currently exercised primarily at the interface between RATP and the transport organising authority, Île-de-France Mobilités, which manages the organisation of transport services and the future

competitive tendering of transport services. ART thus mainly acts as a trusted third party, ensuring the final result of the negotiation between the two parties is balanced.

The pricing of security services provided by RATP

On the RATP's Île-de-France network, security services are provided by the RATP's internal security service, whose mission is to protect, assist and safeguard passengers, staff and property on all the bus, metro, RER and tram networks managed by the company.

The provision of security services has been the subject of a new framework since Law No 2019-1428 of 24 December 2019 on mobility orientation, known as « LOM »²², which entrusted the regulation to ART. The law provides in particular that the rate of the services is established with regard to the cost of the service, which must be that of an efficient operator, increased by a reasonable profit. This reference to the costs of an efficient operator makes it possible, in particular, to include in an incentive framework the implementation of multi-year plans to control the production costs of security services through technological innovations or optimising the organisation.

In application of the French Transport Code²³, RATP drew up a reference and pricing document which listed the security services offered by its internal security service, defined the conditions for carrying out these services and set the price, which may cover a multi-year period. ART issued an opinion on the pricing of these services²⁴.

Since the entry into force of these provisions, ART has issued four opinions on the pricing of security services provided by the RATP's internal security service²⁵. These different opinions have allowed for greater economic rigour and better transparency in the determination of prices, leading to a moderation of price increases.

The setting of the remuneration paid by Île-de-France Mobilités to RATP for its technical management of the Grand Paris public transport network

On the Grand Paris Express network, RATP carried out technical management tasks on behalf of Île-de-France Mobilités: maintenance, monitoring, and maintenance work on the installations. For these assignments, it was remunerated under an agreement reached between the parties.

LOM entrusted ART with the regulation of RATP's activities as technical manager of the Grand Paris Express public transport network. Under the Transport Code²⁶, ART issued an opinion on setting the remuneration paid to RATP for its activity as technical manager of the Grand Paris Express public transport network, RATP being, unlike the historic network, only the operator of this infrastructure rather than the owner.

In this context, ART issued two opinions and took a decision on setting the remuneration for RATP's technical management of the Grand Paris public transport network, paid by Île-de-France Mobilités. It gave an opinion on the remuneration for the 2021–2024 prefiguration period²⁷, set the provisional amount of the contribution for the year 2024²⁸ and gave an opinion on the remuneration planned for the 2024–2029 period²⁹. In doing so, ART contributed to ensuring a fair competitive playing field for activities operated in competition.

FOCUS

²² Supplemented by Decree No 2021-598 of 14 May 2021 on the conditions for the provision of security services by the SNCF and RATP's internal security services.

²³ Articles L. 2251-1-2 and II and III of Article R. 2251-58 of the Transport Code.

²⁴ Articles L. 2251-1-2 and R. 2251-60 of the Transport Code.

²⁵ Opinion No 2022-091 of 13 December 2022 on the pricing for 2023 (unfavourable), Opinion No 2023-018 of 13 April 2023 on the pricing for 2023 (favourable), Opinion No 2024-055 of 23 July 2024 on the pricing for 2024 (unfavourable) and Opinion No 2025-002 of 16 January 2025 on the pricing for 2024 (favourable).

²⁶ Article L. 2142-17 of the Transport Code.

²⁷ Opinion No 2024-012 of 8 February 2024 on the setting of remuneration for the technical management of the Grand Paris public transport network of the Régie

autonome des transports parisiens (RATP) paid by Île-de-France Mobilités for the prefiguration period 2021-2024.

²⁸ Decision No 2024-024 of 28 March 2024 setting the amount of the provisional flat-rate contribution paid by Île-de-France Mobilités to the Régie autonome des transports parisiens (RATP) for its technical management of the Grand Paris public transport network for 2024.

²⁹ Opinion No 2024-063 of 3 October 2024 on the setting of remuneration paid by Île-de-France Mobilités to the Régie autonome des transports parisiens (RATP) for its technical management of the Grand Paris public transport network for the period 2024-2029.

Mobility digital data and services

With the rise of digital services in the field of mobility, travellers now have new tools to learn about their travel and buy their tickets. Since 2019, ART has been responsible for ensuring fair and non-discriminatory access to these digital resources — whether for mobility data or digital ticket distribution channels. It also ensures that they are used transparently, without commercial bias.

Key figures

Since 2022 and the implementation of ART's controls, the number of datasets published on the National Access Point, known as PAN in French (transport.data.gouv.fr), allowing mobility services to provide reliable information to travellers, has been continuously rising, and has increased significantly compared to

previous years. Although the most important networks (metropolises and then regions) were pioneers when PAN was created in 2017, the new publications now come mostly from small local networks, in particular mobility organising authorities (AOMs) created after 2019.



3 reports

on the opening and use of mobility digital data, including a report in 2022 establishing an inventory of the opening and use of mobility digital data, and two reports in 2023 and 2025 presenting the two control campaigns conducted by ART



2 webinars

« Mobility Data Meetings » organised in 2024 and 2025, each of which brought together around 20 speakers and nearly 130 participants



200 controls

carried out (about a hundred per control campaign) between 2023 and 2025



1 report

on the development of multimodal digital services (digital ticket distribution platforms) in 2023

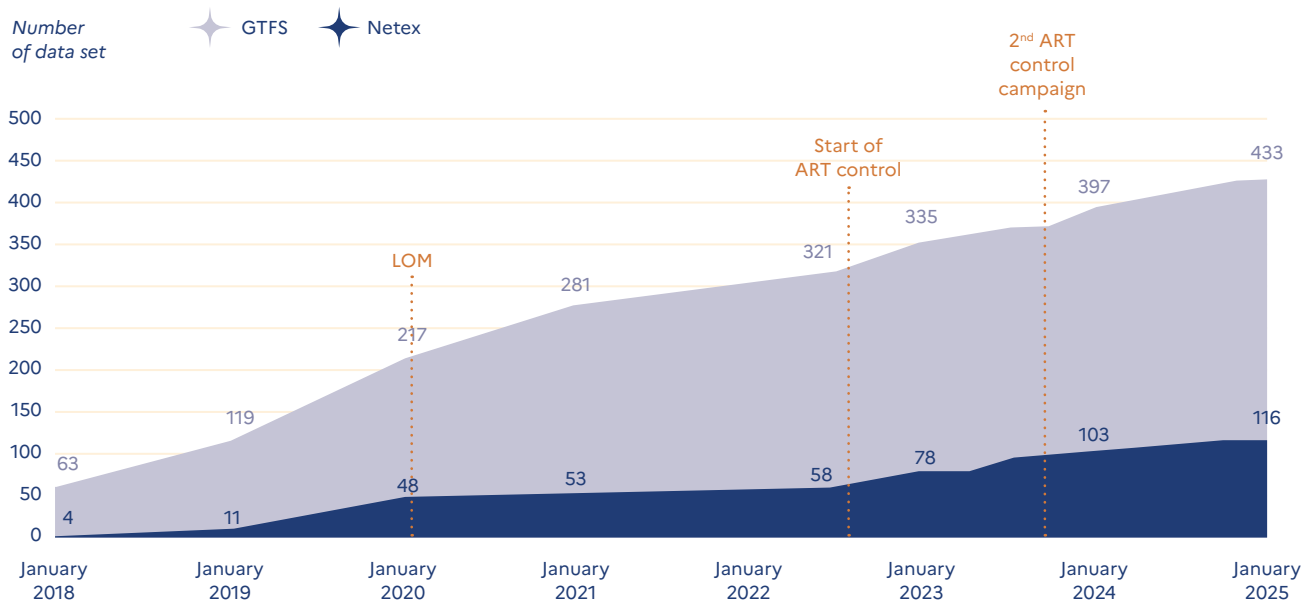


10 decisions

of dispute settlement rendered in 2024 following their referral to ART by Myzee Technology

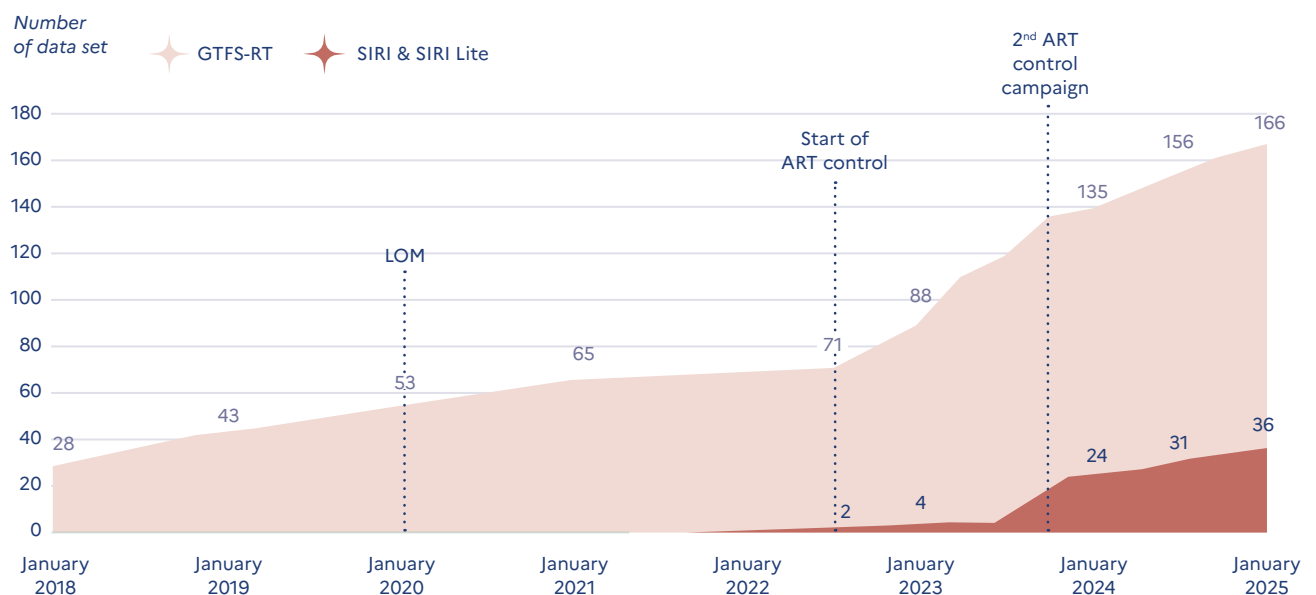
Static data on public transport lines, stops and timetables, which still represent the majority of published data, have increased to 433 available datasets and almost total coverage of existing services in France.

Static data sets since 2018 (scheduled transport services)



With regard to the dynamic or real-time data that provide the actual schedules of the upcoming trajectories and, above all, the disruptions that affect public transport, the publication of the datasets has more than doubled since the start of ART's controls.

Dynamic data sets since 2018 (transport services and real-time disruptions)



ART's major achievements concerning mobility digital data and services

After only five years of regulating the sector, ART has positioned itself as a key stakeholder in the field of mobility digital services. Through its actions to control the opening of mobility data and the settlement of disputes brought before it, ART has contributed to encouraging the transparency of the information made available to passengers, and the development of these tools, which are essential for the decarbonisation of transport.

ART's controls have accelerated the opening of mobility data

The regulator's control policy is based on clear priorities, reminders of the law and support for stakeholders. ART has implemented an educational approach which is based on a series of reminders of the law, accompanied by priorities defined annually by ART board in accordance with the state of play or previous controls. This policy has proved effective in obtaining the publication of more data and, above all, increasing the reuse of data, especially the most recently published data.

Many reusers have already integrated data published thanks to ART's action in their route calculators. This has made it possible to inform

travellers about the transport offer in the territories that have published their mobility data. Of the new datasets published from ART control campaigns, more than 72% have been reused. Furthermore, more than 58% of these datasets have been downloaded a significant number of times (more than 2,000 times).

The data controlled by ART is reused for a variety of purposes. In addition to reuses by route calculators, this data can also be used for other types of reuses, such as studies on the mobility offering in France.

The positive impact of controls for the end user

The data published as a result of the checks is reused and provides information to passengers



Contribution to the publication of

1/3

new data sets

published on the PAN in 2023-2024



72%

data sets

have already been reused by at least one user



58%

data sets

have already been downloaded more than 2,000 times

Clarifying the regulatory framework for multimodal digital services to allow the market to develop

In October 2024, ART issued its first ten dispute resolution decisions on multimodal digital services. These dispute settlements concerned Myzee Technology's dispute with managers of digital services for the sale of public transport tickets³⁰, specifically regarding the possibility of digitally distributing such tickets to users as a 'multimodal digital service provider'.

ART's decisions aimed to clarify the contractual conditions applicable to multimodal digital services. In particular, the regulator ordered the managers of the digital services for the sale of public transport tickets concerned to draw up and publish, within six months, the general and specific contractual terms and conditions applicable to any private or public person providing a multimodal digital service, and wishing to issue or resell the transport tickets relating to public transport services on the perimeter of the networks concerned. It also proposed to Myzee Technology to enter into negotiations on the basis of these contractual terms and conditions in order to reach a multimodal digital service agreement.

Due to their general scope, the regulator's decisions constitute a real point of reference for the future of the sector. The system adopted by ART is intended to apply to all managers of digital services for the sale of public transport tickets in situations comparable to those covered by the decisions concerned. This applies, in particular, to the publication of the general and specific terms and conditions applicable to the issue or resale of tickets relating to public transport services by these managers.

In doing so, the decisions thus made by ART should contribute to the development of multimodal digital services. Indeed, the implementation of the injunctions issued by ART should make it possible to improve the transparency of the conditions of access by multimodal digital service providers to the digital sales services of mobility service managers.

³⁰ Decisions No 2024-065 to 2024-074.

4.

Prospects and future challenges for the regulation of mobility

Cross-sector challenges

The transport sector is facing multiple challenges requiring profound changes in the coming years, both in terms of the infrastructure and services offered to transport operators, and in terms of uses, given the significant development of electric vehicles and mobility digital services. ART's action must take these changes into account.

Reconciling ecological transition and mobility development

In 2025, the transport and mobility sector will face major challenges, the most important of which is the green transition.

Indeed, while France is committed to achieving carbon neutrality by 2050, the weight of the transport sector in greenhouse gas emissions (30% at the national level) makes this issue unavoidable for the transport regulator.

Improving the quality and price of transport services

Maintaining quality mobility at the best price is also crucial, as travel needs remain essential in the daily lives of citizens and for the economic development of businesses.

Indeed, transport represents about 15% of the household budget, and more than 20% among the most modest households. The cost of transport, which is particularly sensitive to changes in energy prices, weighs on the purchasing power of households and on businesses' competitiveness.

Managing the necessary investments in the transport sector in the best possible way

The question of managing and financing infrastructure, an essential one for mobility, is also a major problem for the coming years.

The background of increasing investments to carry out necessary adaptations to climate change in all modes, the renewal of an ageing rail network and, more generally, the need to develop the efficiency and competitiveness of the sector make this issue particularly central.

Facilitating the development of fluid and 'seamless' mobility in a more fragmented transport system

Finally, in addition to these first three challenges, there are progressive, but nevertheless structural, developments in the governance of the transport sector, which will lead to a new distribution of organisational and management competencies for transport services.

The multiplication of stakeholders (State, regional and local mobility-organising authorities, railway undertakings, etc.) underlines the need to change the organisation of the sector and to promote the development of services allowing the user to move smoothly and without interruption from one territory to another.

Sectoral challenges



RAIL

To create the conditions to accelerate the development of rail transport and to make the most of opening up to competition

With regard to rail services, the process of opening up to competition for passenger transport will become a reality within the current decade.

Many stakeholders have expressed interest in contributing to the development of rail mobility in France, but the existence of entry barriers has so far led to the arrival of only a few stakeholders for freely organised passenger transport services.

On the side of services contracted by the regions, in particular for daily transport, the principle of awarding contracts after competitive tendering is now the rule, and competition is developing over the course of calls for tenders.

In both cases, the challenge is therefore to lower the barriers to entry and to facilitate the arrival of new stakeholders to allow the development and improvement of rail services.



ROAD PASSENGER TRANSPORT BY COACH

**To enable low-cost travel
throughout France by supporting
the development of long-distance coaches**

Since their liberalisation, freely organised coaches have experienced significant growth, offering French people a sustainable and inexpensive means of transport to travel anywhere in the country. Nevertheless, the market suffers from a qualitative and quantitative deficit in terms of coach stations.

If this is not resolved, the market will not reach its full potential. This is the main challenge for the regulator: to ensure that carriers have access to central reception infrastructure, sufficiently sized and offering adequate services to users and carriers.



MOTORWAYS

To prepare the future of French motorways

With regard to motorways, the seven largest historical concessions, representing more than 90% of the motorway concession network (in km), will end between 2031 and 2036.

In the meantime, in order to ensure public assets are managed correctly and quality motorway infrastructure is used, two major actions must be

undertaken: (i) ensuring infrastructure is returned in good condition at the end of the concessions and, more generally, the investment provided for in contracts is realised, and (ii) preparing for the future by drawing lessons from the current motorway concessions, including from a regulatory point of view.



AIRPORTS

To work towards a multi-year and differentiated regulation

The transition from annual approvals to multi-year regulation by signing economic regulation contracts (CRE) between the State and airport operators is the major challenge facing price regulation in the coming years.

Beyond this development, ART is looking to work to promote differentiated regulation in accordance with the situation of airports,

as well as an improvement in consultation between airports and airlines.

At the European level, it would also be desirable to strengthen the independence and competency of the national supervisory authorities and to involve them in defining the regulatory till systems while establishing harmonised economic monitoring.



URBAN PUBLIC TRANSPORT IN THE ÎLE-DE-FRANCE REGION

To oversee today's monopoly, supporting the opening up to competition and building the regulatory framework of tomorrow

The end of RATP's historic monopoly will not definitively take place until 2040.

At the end of this term, any possible monopolistic advantage must be prevented by ensuring that RATP does not exploit its dominant position to benefit from excessive remuneration or to make financial transfers between its different activities.

For the future, the regulator's challenge will be to allow a gradual and fair transition to competition, guaranteeing from today on the Grand Paris public transport network, and at a later date on the historic network, a fair playing field between RATP and the new operators.



MOBILITY DIGITAL SERVICES

To facilitate user access to the digital distribution of rail and multimodal tickets

In the context of the dispute settlements rendered on mobility digital services, and in connection with the opening up to rail competition, ART notes that a change in the current legislative framework is essential in order to integrate national rail services. Supporting the transition to a national or even European level of the regulation of mobility digital services, currently limited to the local and regional level, is thus one of the main challenges for the future.

In addition, the European Commission has two legislative initiatives on rail and multimodal ticketing. At the European level, these initiatives promote better access, on the one hand, to distribution platforms for the sale of all transport services and, on the other, to transport services for major stakeholders in digital distribution. These legislative initiatives are welcome in order to overcome the limitations of the current legal framework.

5.

ART's workforce



Key figures

Since the creation of ART (on 1 June 2025)

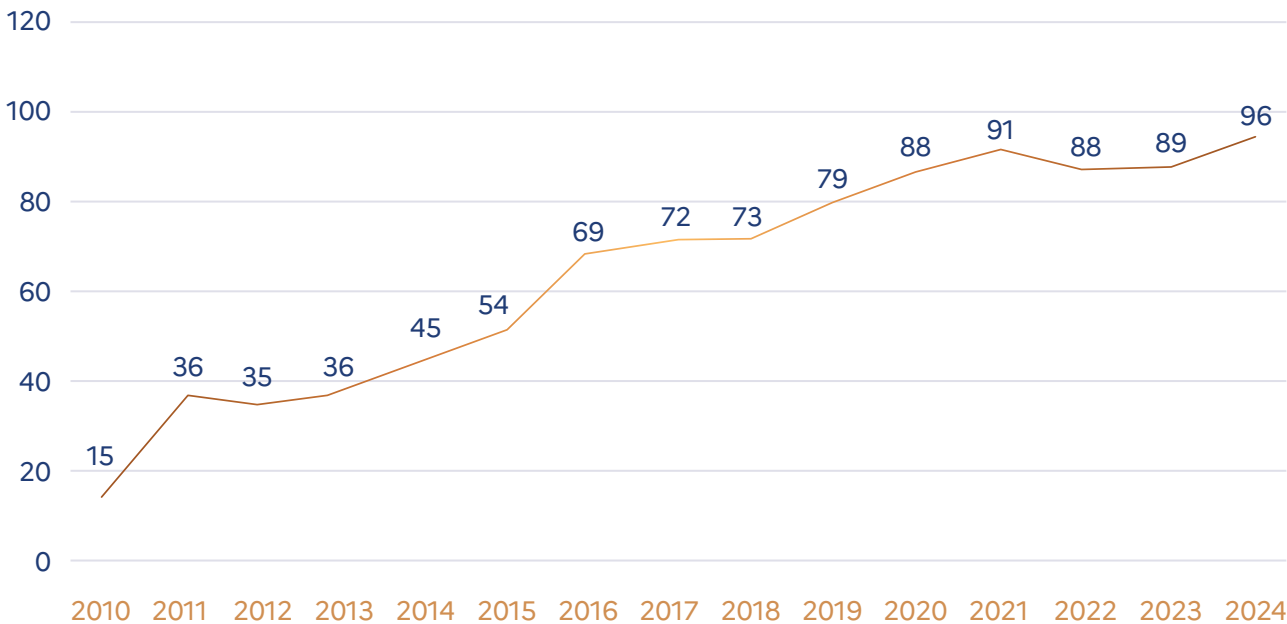


267
agents

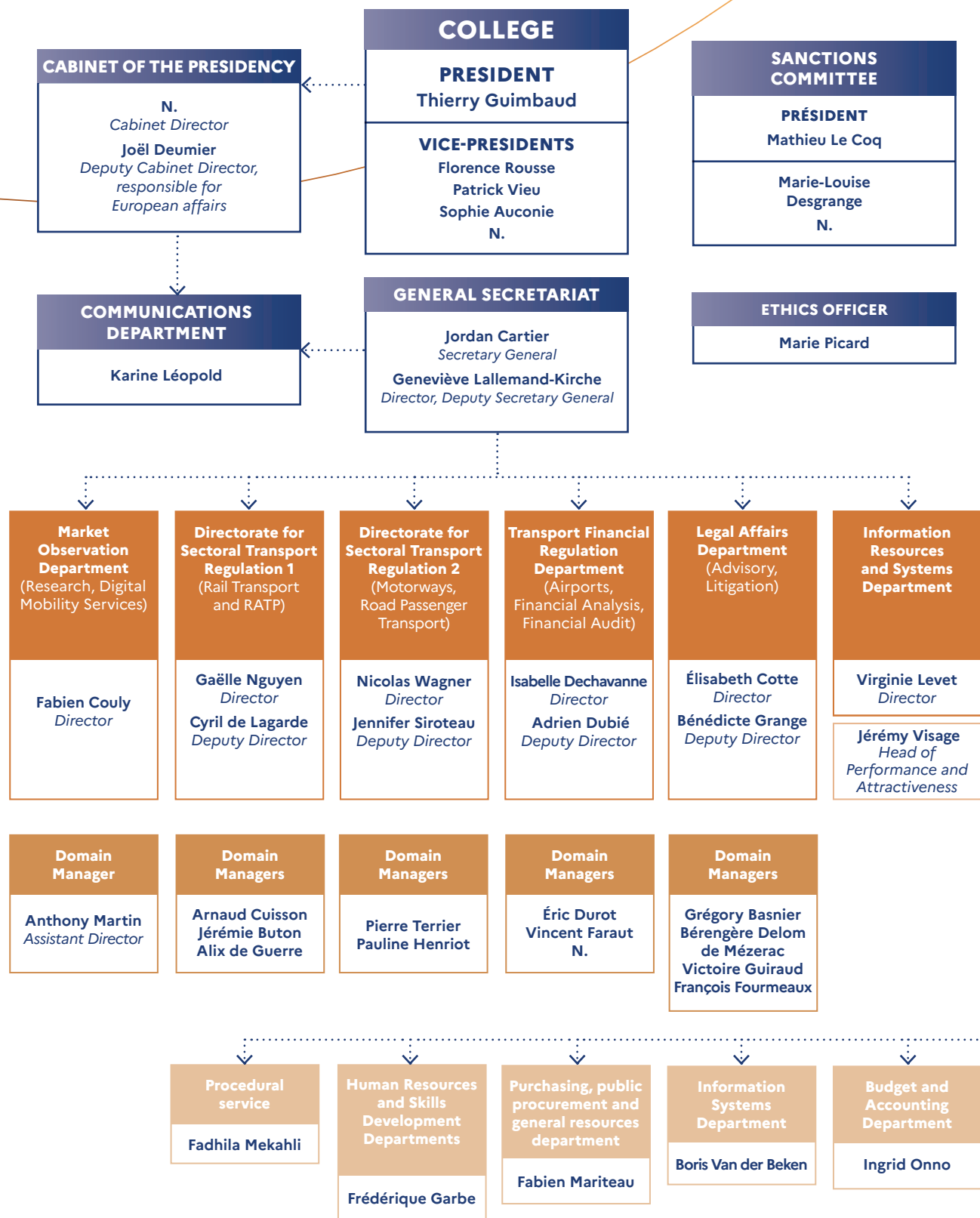


18 board
members

Evolution of the number of agents



Organisation chart as of 1 June 2025





<https://www.autorite-transports.fr/>



linkedin.com/company/art-autorite-de-regulation-des-transports/



[autoritederegulationdestra7864](https://youtube.com/autoritederegulationdestra7864)

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